

USDA Weekly Retail Turkey Feature Activity

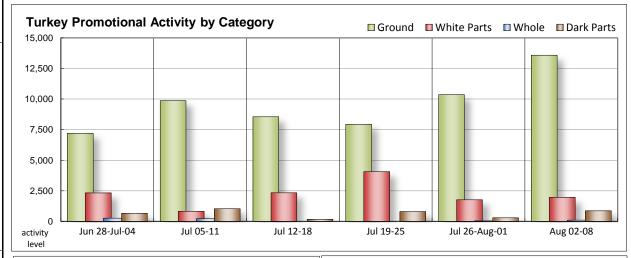
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/02 thru 08/08.

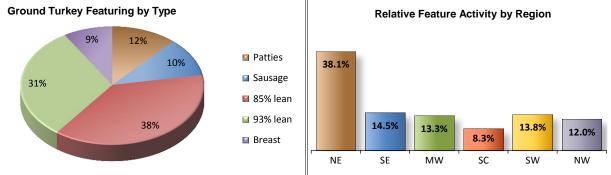
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY											
	LAST	YEAR									
Feature Rate 1/		WEEK of 23,200		WEEK of 23,200	30.6% of 22,500 outlets						
		tlets		tlets							
Special Rate 4/		.8%		.1%	0.0%						
Activity Index 2/ 3/	18 Stores	,970	13 Stores	,670	11,890						
WHOLE BIRDS:	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg					
Fresh - Hens											
" - Toms											
Frozen - Hens	110	0.99	30	1.12	20	0.99					
" - Toms	110	0.33	20		20	0.55					
PARTS:				11.10							
Breast:											
Bone-in, whole											
Fresh			10	2.49	60	2.99					
Frozen	910	1.66	330	-	520						
Split, bone-in											
Fresh			50	2.99							
Rotisserie	320	8.63	420	7.96	210	6.84					
Boneless, whole	10	3.99	100	5.14	210	5.36					
Cutlets	430	5.04	580	4.89	500	5.25					
Cutlets, thin sliced											
Strips					20	3.99					
Tenders	290	4.82	280	4.47	290						
Marinated Tenders	850	_	730		520						
Drumsticks	280		80		310						
Thighs	150	1.96			250	1.97					
Wings	290	2.09	30	1.88	380	1.92					
Necks	50	1.79	20	1.57	250	1.91					
Smoked Drumsticks	40	2.09	60	1.86	100	2.01					
Smoked Wings	30	1.96	80	1.89	100	1.96					
Smoked Necks	30	1.96	30	1.89	100	1.75					
GROUND TURKEY:	13,580	3.13	10,360	3.37	7,400	3.32					
Patties	1,580	3.61	1,120	3.20	1,310	3.14					
Sausage	1,440	3.35	1,360	3.30	230	3.16					
85% lean	5,160	2.53	1,640	2.79	810	2.32					
93% lean	4,210	3.25	4,200	3.22	3,940	3.15					
Breast	1,190		2,040		1,110						
Rolls (frsh/frz 1 lb.)	890	2.66	180	1.62	200	1.83					
Specialty ^{5/}											
Patties	280		110		150						
93-94% lean	340		150		260						
Breast	90		20		40						
Note: rolls & specialty no	ot included	ın ground	turkey tota	ai and weigl	nted avera	age.					

This Week's Turkey Feature Highlights

Promotional activity is sharply higher for the first of the month even as ads for school supplies creep into the circulars. Light feature activity on frozen hens is at lower prices. More stores are promoting frozen bone-in breasts; prices are lower. Rotisserie offerings are fewer in number; prices are higher. Instead, look at the marinated tenders; they continue to be the most heavily promoted boneless white part and prices are lower compared to cutlets and tenders. Dark parts are getting more space in the circulars, mostly fresh parts at higher prices. Ground turkey feature activity has taken off, with many stores offering multiple choices of grinds. This week 85% lean is the most actively promoted and the only grind to see a price decline. Offerings also increase on rolls and specialty grinds. Deli feature activity increases on both service and self-service items. Service deli offerings increase on private label thin slicing turkey and processor label thick slicing chicken. Fewer stores offer private label self-service deli, relying on packer labels to fill the ad space. August is here, vacations are winding down, and soon the children will be back in school wondering where the summer went.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



Fri. Aug 02, 2013

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/02 thru 08/08.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTH	IEAST U.S.			SOUT	HEAST U.S.	MIDWEST U.S.				
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,MS,NC,SC,TN,VA,WV)				(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)			
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	0.2% of stores w	ndex = 8,050	tions	3.4%	of stores v	00 sampled outle v/ no-price promo v Index = 4,160	tions	43.1% of 4,200 sampled outlets 4.8% of stores w/ no-price promotions Activity Index = 2,560			
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)		Summary Stores Wtd Avg		Price Range (\$/pound)		Summary Stores Wtd Avg	
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens									0.99	50	0.99
" - Toms											
PARTS:											
Breast:											
Bone-in, whole											
Fresh											
Frozen	1.59 - 2.27	60	2.00	1.29	- 2.27	620	1.68	1.38	- 1.59	90	1.44
Split, bone-in											
Fresh											
Rotisserie	7.99 - 8.99	300	8.67		7.99	20	7.99				
Boneless, whole	3.99	10	3.99								
Cutlets	4.55 - 4.99	400	4.97						6.34	20	6.34
Cutlets, thin sliced											
Strips											
Tenders	4.99	210	4.99					3.99	- 5.58	80	4.38
Marinated Tenders	4.26 - 4.99	800	4.53	4.26	- 4.79	50	4.43				
Drumsticks	1.69 - 1.99	230	1.89		1.79	50	1.79				
Thighs	2.29	50	2.29						1.79	100	1.79
Wings	1.69 - 2.99	230	2.08	1.79	- 2.99	60	2.11				
Necks					1.79	50	1.79				
Smoked Drumsticks	1.99	20	1.99						1.69	10	1.69
Smoked Wings	1.99	20	1.99		1.89	10	1.89				
Smoked Necks	1.99	20	1.99		1.89	10	1.89				
GROUND TURKEY:											
Patties	2.99 - 3.99	790	3.39	3.50	- 3.99	100	3.63	3.00		260	3.84
Sausage	2.49 - 3.99	910	3.36					2.87		360	3.33
85% lean	1.99 - 3.00	960	2.70		- 2.80	2,920	2.38	2.33		450	2.77
93% lean	2.33 - 3.84	1,720	3.25		- 3.07	170	3.01		- 3.50	560	3.20
Breast (99-100% lean)	4.61 - 5.38	350	4.69		- 4.61	40	4.51	3.99		230	4.13
Rolls (frsh/frz 1 lb.)	2.50 - 3.39	450	2.74	3.16	- 3.39	50	3.30	1.00	- 3.39	180	2.48
Specialty ^{5/}											
Patties	3.99 - 4.99	270	4.97						3.99	10	3.99
93-94% lean	3.59 - 3.99	180	3.70		F 40	40	F 40	3.99		150	4.05
Breast USDA Agricultural	5.00 - 5.49	70	5.36	Na (545)	5.49	10	5.49		5.49	10	5.49



Fri. Aug 02, 2013

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/02 thru 08/08.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH	CENTRAL U.S.		SOUT	HWEST U.S.		NORTHWEST U.S. (AK,ID,MT,OR,WA,WY) 52.2% of 1,200 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 690			
	(AR,AZ,CO,KS,	LA,MO,NM,OK,TX	,UT)	(CA,HI,NV)					
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	0.0% of stores v	00 sampled outle v/ no-price promo v Index = 1,590	tions	0.0% of stores Activit	000 sampled outle w/ no-price promo y Index = 1,920	otions				
	Price Range (\$/pound)	Summar Stores V	y Vtd Avg	Price Range (\$/pound)	Summa Stores	ry Wtd Avg	Price Range (\$/pound)	Summai Stores \	y Vtd Avg	
WHOLE BIRDS: Fresh - Hens " - Toms Frozen - Hens " - Toms	0.99	60	0.99							
PARTS: Breast: Bone-in, whole Fresh Frozen Split, bone-in Fresh Rotisserie Boneless, whole Cutlets Cutlets, thin sliced Strips Tenders Marinated Tenders	1.39 - 1.79	140	1.56	5.45	10	5.45				
Drumsticks Thighs Wings Necks Smoked Drumsticks Smoked Wings Smoked Necks GROUND TURKEY: Patties Sausage 85% lean 93% lean Breast (99-100% lean) Rolls (frsh/frz 1 lb.) Specialty 5//	2.69 3.00 - 3.99 3.19 - 3.27 1.99 - 2.80 2.80 - 3.49 4.39 - 4.99 2.49	100 20 410 450 360 40	2.69 3.50 3.24 2.71 3.35 4.97 2.49	3.99 3.27 - 3.33 2.29 - 2.80 3.19 4.79 - 5.35 2.49	320 140 350 870 50 170	3.99 3.32 2.69 3.19 5.22 2.49	3.79 3.33 2.80 3.03 - 3.99 3.90 - 4.39	10 10 70 440 160	3.79 3.33 2.80 3.37 3.97	
Patties 93-94% lean Breast		hada Baultuu 8 G		4.59	10	4.59	ANG 4 O U DONA - I			



Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/02 thru 08/08.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

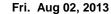
	N	ATIONAL	SUMMAR	RY			NORTHEAST U.S.		SOUTHE	SOUTHEAST U.S.		
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,NC,SC,TN,VA,WV)			
	80.3% o	f 23,200	73.7% d	f 23,200	78.0% c	of 22,500						
Feature Rate 1/	sto	res	sto	res	sto	res	86.1% of 4,600 sampled outlets			82.5% of 6,100 sampled outlets		
Anticity In Jan 01	50	000	45	540	40	000	*	ex = 14,530		Activity Index = 11,290		
Activity Index 2/	50,	280	45,	540	46,	820	Price Range	Summa	ary	Price Range	Summary	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores V	Vtd Avg
SERVICE DELI - Turkey												
Category 1												
Processor Brand	4,760	8.14	6,000	7.81	6,210	8.24	5.99 - 10.99	1,400	8.04	6.99 - 8.99	1,580	8.88
Private Brand	1,380	7.87	2,270	7.55	2,900	7.24	6.99 - 8.99	670	7.92	7.49 - 7.99	460	7.76
Category 2												
Processor Brand	4,290	6.08	4,620	5.85	5,970	6.05	4.99 - 6.99	1,360	6.19	4.99 - 6.69	620	5.97
Private Brand	5,460	7.20	3,010	6.85	2,530	6.47	4.99 - 8.99	1,450	6.84	5.99 - 8.99	1,520	6.49
Category 3												
Processor Brand	740	4.07	1,020	4.18	570	4.00	3.98 - 4.99	430	4.04	3.98	40	3.98
Private Brand	320	4.85	60	4.98	60	3.93	3.77 - 4.99	150	4.69			
Turkey Ham												
Processor Brand	460	3.84	340	3.62	530	3.29	3.99 - 4.99	210	4.31	4.99	30	4.99
Private Brand												
Turkey Pastrami												
Processor Brand	350	4.48	140	3.51	340	4.21	3.99 - 4.99	290	4.41	4.99	30	4.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,740	7.63	2,150	7.74	2,990	6.93	5.77 - 9.99	1,980	7.78	5.79 - 8.99	370	7.63
Private Brand	2,380	7.30	3,290	7.56	3,050	6.85	6.99 - 7.99	1,790	7.41	6.99	70	6.99
Category 2												
Processor Brand	80	4.99	70	5.37	220	5.15	4.99	70	4.99			
Private Brand	220	7.53	410	5.87								
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	10,980	3.15	8,730	2.88	9,800	2.97	2.50 - 4.00	1,850	3.34	2.19 - 3.99	2,560	3.14
Private Brand	770	3.06	1,470	3.15	940	2.96	3.00	60	3.00	2.50	50	2.50
Turkey 16 oz												l
Processor Brand	2,850	4.53	2,040	4.39	650	6.21	3.98 - 5.99	1,000	5.16	3.99 - 5.99	1,220	4.10
Private Brand	210	4.99			160	5.49	4.99	10	4.99	4.99	200	4.99
Chicken 7-10 oz												
Processor Brand	,	3.17	8,560	2.88	8,960	2.98	2.50 - 4.00	1,810	3.36	2.50 - 3.99	2,490	3.16
Private Brand	690	3.06	1,360	3.20	940	2.96				2.50	50	2.50

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Fri. Aug 02, 2013

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/02 thru 08/08.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHV	/EST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA,I	HI,NV)	(AK,ID,MT,	OR,WA,WY)		
Feature Rate 1/	77.00/ -5.4.000		75.70/ -5.4.00	0lad audlada	75 50/ - (0 000					
		sampled outlets	·	0 sampled outlets	· ·	sampled outlets	84.5% of 1,200 sampled outlets Activity Index = 2,680			
Activity Index 2/	Price Range	ndex = 8,820 Summary	Price Range	ndex = 7,580 Summary	Price Range	dex = 5,380 Summary	Price Range	Summary		
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey	(φ/ροαπα)	Otores Wita Avg	(φ/ροαιία)	Otores vvia / tvg	(φ/ροαπα)	Clores Wild / Wg	(φ/ροαπα)	Otores Wid My		
Category 1										
Processor Brand	6.49 - 10.99	1,000 7.10	6.99 - 9.99	250 8.28	7.99 - 10.99	220 8.16	6.98 - 9.99	310 8.05		
Private Brand	6.99 - 8.99	230 7.92	7.99	20 7.99						
Category 2										
Processor Brand	4.48 - 6.99	960 5.88	4.99 - 6.99	530 6.01	4.99 - 6.99	490 6.66	4.99 - 5.99	330 5.73		
Private Brand	5.88 - 8.99	860 6.66	4.99 - 8.99	690 7.89	8.99	550 8.99	7.49 - 8.99	390 8.73		
Category 3										
Processor Brand	3.98 - 4.99	130 4.25	3.99	140 3.99						
Private Brand					4.99	170 4.99				
Turkey Ham										
Processor Brand	2.98 - 5.49	30 4.68	3.19	10 3.19	2.69 - 3.49	180 3.00				
Private Brand										
Turkey Pastrami										
Processor Brand	2.98 - 5.49	30 4.68								
Private Brand										
SERVICE DELI - Chicken										
Category 1										
Processor Brand	5.98 - 8.99	610 6.55	5.98 - 8.99	320 7.34	8.99	250 8.99	7.99 - 10.99	210 8.12		
Private Brand	6.99 - 10.99	30 8.43	5.69 - 7.99	490 6.88						
Category 2										
Processor Brand	4.99	10 4.99								
Private Brand	5.98 - 5.99	50 5.99	7.99	80 7.99	7.99	70 7.99	7.99	20 7.99		
SELF-SERVICE DELI										
(dollars per tub or pouch)										
Turkey 7-10 oz										
Processor Brand	1.88 - 3.98	2,300 2.84	1.99 - 2.49	2,160 2.94	2.29 - 3.99	1,540 3.55	2.88 - 3.99	570 3.49		
Private Brand	2.69 - 3.29	150 2.78	2.89	210 2.89	2.99	170 2.99	3.99	130 3.99		
Turkey 16 oz	2.00 4.00	00 4.04	2.00 4.00	400 400	1.40	40 440	4.40	20 440		
Processor Brand	3.99 - 4.99	90 4.21	3.99 - 4.99	480 4.38	4.49	40 4.49	4.49	20 4.49		
Private Brand Chicken 7-10 oz										
Processor Brand	2.49 - 3.98	2,210 2.85	1.99 - 2.49	1,990 2.97	2.29 - 3.99	1,530 3.56	2.88 - 3.99	570 3.49		
Private Brand	2.49 - 3.96	130 2.69	2.89	210 2.89	2.29 - 3.99	170 2.99	3.99	130 3.99		
i iivate bialiu	2.03	100 2.09	2.09	210 2.03	2.33	110 2.33	5.55	100 3.33		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)